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Report Highlights:

Poland's red meat output decreased an estimated 5 percent in 2001 but will recover by 4 percent in 2002. Output of pork is expected to increase in 2002 while beef production will continue to fall. Exports of pork and pork products are expected to increase in 2002 due to higher domestic output. Exports of beef are also expected to grow in 2002 due to high government beef stocks accumulated in 2001.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
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I. Situation and Outlook

It is estimated that Poland's red meat output decreased 5 percent in 2001 but will recover by 4 percent in 2002. In 2001, the grain harvest was 21 percent higher than in 2000. This caused lower feed prices which are expected to lead to higher meat production in 2002.

BEEF

Cattle inventories will continue to decrease in 2002. However, the decrease of dairy cow inventories is expected to be much slower than other cattle due to profitable raw milk prices. Farmers produce young fattening cattle for export as a side enterprise of their dairy herds. Exports of young cattle declined 18 percent in 2001 and are expected to decline another two percent in 2002 due to lower cattle inventories. Declining raw milk supplies will likely have a positive effect on the future profitability of the cattle sector; higher milk prices should stimulate investment in genetics and equipment.

Production of beef has been decreasing since 1998 as consumers tended to avoid beef as a result of the fear of BSE and switched to poultry meat as a substitute. Beef production will likely decrease by 5 percent in 2002 due to reduced cattle inventories and slaughter. Demand for imported beef also remains low. It is estimated that in 2002, consumption of beef will remain at the 2001 level. Most domestically produced beef is added to pork sausages or canned meat products and exported to FSU markets. This part of domestic beef utilization remains stable. However, the drop in consumption of unprocessed beef, which bottomed out in 2001, is unlikely to change in 2002.

Trade Prospects

Since high quality corn-fed beef is not produced in Poland, U.S. choice beef has found a niche in premier Polish restaurants. The market could potentially expand to large supermarkets which currently dominate the Polish food retail sector. In the first three quarters of 2001, Poland imported 2,331 kilograms of U.S. choice beef. USMEF actively promotes U.S. high quality beef on the Polish market.

Poland remains a major importer of beef offal importing approximately 10,000 -12,000 tons annually. The United States and Australia are the major suppliers of beef offal.

In 2002, beef exports are expected to increase by 33 percent as a result of high beef stocks built up in 2001 due to reduced consumption. Exports are also expected to grow in 2002 because several European competitors can not export to the Eastern markets due to BSE; this will enable Poland to fill the gap. It is expected that the majority of beef from Polish government stocks will be exported in 2002 to Russia, Italy, Germany and Sweden. Poland is also attempting to upgrade its meat processing sector in order to improve export possibilities to EU member states both before and after accession. Poland's government hopes to achieve EU accession by January 1, 2004.

Poland represents a potential market for U.S. dairy genetics. In July 2001, USDA successfully completed negotiations with Polish veterinary authorities opening the Polish market for exports of U.S. dairy heifers and young breeding bulls. As a result, two shipments of young breeding Holstein bulls arrived in Poland in the fall of 2001 and another group of bulls is under quarantine and will be shipped in the first quarter of 2002.

BSE

Poland has had no confirmed cases of BSE. However, the European Union considers Poland a high risk country because of substantial imports of EU origin meat and bone meal during the 1990s. The new Polish Government plans to slightly modify the BSE testing system. Instead of testing all slaughtered cattle age 24 months and above for BSE, they will test 100 percent of slaughtered cattle age 30 months and above starting the end of January 2002. Tests will continue to be carried out on all dead cattle, animals which manifest symptoms of nervous system disorders and imported cattle. Poland ran 45,000 tests for BSE in 1999 and 2000. According to Polish Veterinary Service authorities, the fact that no BSE cases have been confirmed in Poland, inclusive of the time since the 100 percent testing regime of slaughtered cattle age 24 months and above was begun, indicates that the risk of BSE occurrence in Poland might be less probable than originally estimated by EU veterinary experts. The major reason for maintaining such a costly regime of BSE testing in Poland is to assure EU veterinary authorities that Poland's monitoring system for BSE is accurate. Polish vets expect that ultimately the EU will change its BSE risk classification of Poland from a high to low risk category.

Trade Policy

Since 1995, Poland has maintained a tariff rate quota for beef. The quota for 2002 is 23,195 tons (5,650 MT for HTS 0201 and 17,545 MT for HTS 0202). The tariff on in-quota trade for fresh, chilled and frozen beef remains at 30 percent. The over-quota tariff is 45 percent. All meat imported into Poland must be accompanied by a health certificate issued by a government-approved veterinarian from the exporting country. Products also must bear a label in Polish with the date of production clearly stated. There is zero tolerance for the presence of hormones in imported beef, but Polish veterinary authorities do not require that beef originates from cattle which have not been treated with growth promoting hormones. Each imported shipment of beef is tested.

In addition, suppliers should check with importers regarding Polish standards for products sold in Poland and stored in-country for transshipment. Poland has a set of quality standards for storage conditions of meat and meat products and validity of the products depending on conditions and temperature of storage. (See Gain Report #PL1002 on Polish Norms).

PORK

The hog inventories cycle bottomed out in mid 2001 and started to rebound in the second half of the year. Consequently, hog slaughter and pork output is expected to increase in 2002.

Pork remains the primary meat produced in Poland. In 2002, pork production is expected to increase due to lower feed grain prices, growing inventories and slaughter. It is estimated that exports of pork and pork products in 2002 will increase because of higher output. Poland's live hog imports are limited to breeding hogs mainly from France. In 2002, pork consumption is expected to increase by 3 percent because of lower prices as a result of growing output.

Trade

In 2002, pork imports are expected to decrease due to higher domestic output. However, expected lower supplies of pork in the first quarter of 2002 may stimulate temporary early 2002 imports. The total import quota for pork in 2002 is 46,480 tons (HTS 0203). The within tariff quota is 30 percent. All meat shipments to Poland must be accompanied by a health certificate issued by a government-approved veterinarian from the exporting country. Products also must bear a label in the Polish language with the date of production clearly stated. Exports of canned hams to the United States are expected to grow in 2002 due to higher pork output. Canned hams and shoulders exported to the United States are produced in USDA-inspected plants and are generally of higher quality than available on the domestic market.

Other reports of interest:

- Gain Report #PL1002 "Polish Norms"
- Gain Report #PL1026 "Poultry Annual"
- Gain Report #PL1038 "Dairy Annual"
- Gain Report #PL1028 "Annual Grain&Feed"

II. Statistical Tables

Animal Numbers, Cattle

PSD Table						
Country	Poland					
Commodity	Animal Numbers, Cattle				(1000 HEAD)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2001		01/2002
Total Cattle Beg. Stks	6093	6093	5722	5722	5700	5500
Dairy Cows Beg. Stocks	3296	3296	3150	3130	3100	3100
Beef Cows Beg. Stocks	0	0	0	0	0	0
Production (Calf Crop)	2750	2750	2600	2600	2560	2500
Intra EC Imports	0	0	0	0	0	0
Other Imports	13	13	0	0	2	0
TOTAL Imports	13	13	0	0	2	0
TOTAL SUPPLY	8856	8856	8322	8322	8262	8000
Intra EC Exports	0	0	0	0	0	0
Other Exports	510	502	255	410	360	400
TOTAL Exports	510	502	255	410	360	400
Cow Slaughter	250	250	150	200	150	150
Calf Slaughter	700	700	750	750	750	750
Other Slaughter	1550	1550	1300	1350	1300	1300
Total Slaughter	2500	2500	2200	2300	2200	2200
Loss	124	132	167	112	152	100
Ending Inventories	5722	5722	5700	5500	5550	5300
TOTAL DISTRIBUTION	8856	8856	8322	8322	8262	8000
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Import Trade Matrix, Live Cattle

Import Trade Matrix					
Country	Poland		Units:	Head	
Commodity	Animal Numbers, Cattle		Partial Begin	Jan	
			Partial End	Sep	
Imports for:	2000	2001	2002	2000	2001
	Full	Full	Full	Partial	Partial
U.S.		50	200		
Others					
The Netherlands	5555	0	0	4188	0
Germany	3465	0	0	2156	75
Lithuania	3261	0	0	2944	0
France	498	0	0	394	0
Denmark	245	0	0	210	0
Czech Republic	93	200	0	40	92
Sweden	30	0	0	0	0
Austria	25	30	0	0	182
Estonia	22	0	0	0	42
Hungary	0	100	100	0	65
Total for Others	13194	330	100	9932	456
Others not Listed	0	120	200	0	0
Grand Total	13194	500	500	9932	456

Export Trade Matrix, Live Cattle

Export Trade Matrix					
Country	Poland		Units:	Head	
Commodity	Animal Numbers, Cattle		Partial Begin	Jan	
			Partial End	Sep	
Exports for:	2000	2001	2002	2000	2001
	Full	Full	Full	Partial	Partial
U.S.					
Others					
Italy	271617	240000	210000	221559	196726
Croatia	52099	33000	35000	20000	27004
Bosnia&Herceg	48736	32000	30000	25000	25703
Israel	45798	50000	50000	38704	39292
The Netherlands	26714	10000	20000	21142	8513
Slovenia	17818	6000	15000	14704	4469
Germany	16529	10000	15000	15607	7481
Russia	0	0	0	0	2721
Spain	8035	15000	10000	7945	11315
Greece	4538	2500	5000	3466	2119
Total for Others	491884	398500	390000	368127	325343
Others not Listed	10006	11500	10000	6500	6000
Grand Total	501890	410000	400000	374627	331343

Prices Table, Live Cattle

Prices Table			
Country	Poland		
Commodity	Animal Numbers, Cattle		
Prices in	zlotys	per uom	kilogram of live weight
Year	2000	2001	% Change
Jan	2.65	2.89	9.06%
Feb	2.72	2.66	-2.21%
Mar	2.78	2.53	-8.99%
Apr	2.8	2.89	3.21%
May	2.8	2.92	4.29%
Jun	2.83	2.87	1.41%
Jul	2.87	2.87	0.00%
Aug	3	2.96	-1.33%
Sep	3.12	2.97	-4.81%
Oct	3.22	2.95	-8.39%
Nov	3.15	2.86	-9.21%
Dec	3.01		
Exchange Rate	4.05	Local currency/US \$	

Meat, Beef and Veal

PSD Table						
Country	Poland					
Commodity	Meat, Beef and Veal				(1000 MT CWE)(1000 HEAD)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2001		01/2002
Slaughter (Reference)	2500	2500	2200	2300	2200	2200
Beginning Stocks	16	16	20	20	25	45
Production	325	325	290	305	290	290
Intra EC Imports	0	0	0	0	0	0
Other Imports	3	0	1	0	1	0
TOTAL Imports	3	0	1	0	1	0
TOTAL SUPPLY	344	341	311	325	316	335
Intra EC Exports	0	0	0	0	0	0
Other Exports	18	23	15	30	20	40
TOTAL Exports	18	23	15	30	20	40
Human Dom. Consumption	285	298	246	250	244	250
Other Use, Losses	21		25		27	
TOTAL Dom. Consumption	306	298	271	250	271	250
Ending Stocks	20	20	25	45	25	45
TOTAL DISTRIBUTION	344	341	311	325	316	335
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Import Trade Matrix, Meat, Beef and Veal

Import Trade Matrix					
Country	Poland		Units:	Tons	
Commodity	Meat, Beef and Veal		Partial Begin	Jan	
			Partial End	Sep	
Imports for:	2000	2001	2002	2000	2001
	Full	Full	Full	Partial	Partial
U.S.	13	5	20	11	3
Others					
Russia	20	5	10	20	0
Germany	0	0	0	52	0
Sweden	0	30	0	25	26
Hungary	58	0	10	46	0
Norway	162	0	0	162	0
Denmark	36	0	0	17	0
Argentina	6	0	0	6	0
Great Britain	3	0	0	3	0
Australia	16	15	20	16	0
Austria	20	0	0	20	0
Total for Others	321	50	40	367	26
Others not Listed	126	15	10	19	32
Grand Total	460	70	70	397	61

Export Trade Matrix, Meat, Beef and Veal

Export Trade Matrix					
Country	Poland		Units:	Tons	
Commodity	Meat, Beef and Veal		Partial Begin	Jan	
			Partial End	Sep	
Exports for:	2000	2001	2002	2000	2001
	Full	Full	Full	Partial	Partial
U.S.	38			33	
Others					
Italy	5878	7000	10000	4905	4637
Germany	4624	1000	3000	3528	799
Macedonia	2076	1000	1500	1651	817
Sweden	1532	2000	2500	1040	1285
Russia	1401	6000	10000	976	4035
Romania	0	2000	2500	0	1489
Bosnia&Herceg	628	100	150	548	73
Ukraine	0	1000	1500	58	877
Bulgaria	327	600	700	328	417
Estonia	314	2500	3000	0	1663
Total for Others	16780	23200	34850	13034	16092
Others not Listed	3720	4000	4000	3370	2429
Grand Total	20538	27200	38850	16437	18521

Prices Table, Beef

Prices Table			
Country	Poland		
Commodity	Meat, Beef and Veal		
Prices in	zlotys	per uom	kilogram of roast beef-bone in
Year	2000	2001	% Change
Jan	9.22	10.72	16.27%
Feb	9.23	10.67	15.60%
Mar	9.26	10.56	14.04%
Apr	9.3	10.44	12.26%
May	9.39	10.42	10.97%
Jun	9.52	10.4	9.24%
Jul	9.78	10.47	7.06%
Aug	10.07	10.55	4.77%
Sep	10.3	10.67	3.59%
Oct	10.66	10.7	0.38%
Nov	10.75		
Dec	10.76		
Exchange Rate	4.05	Local currency/US \$	

Animal Numbers, Swine

PSD Table						
Country	Poland					
Commodity	Animal Numbers, Swine				(1000 HEAD)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2001		01/2002
TOTAL Beginning Stocks	18224	18224	16988	16988	17000	17400
Sow Beginning Stocks	1703	1703	1650	16500	1700	1750
Production (Pig Crop)	22300	22300	21900	23250	23400	24700
Intra EC Imports	0	0	0	0	0	0
Other Imports	3	3	0	0	2	0
TOTAL Imports	3	3	0	0	2	0
TOTAL SUPPLY	40527	40527	38888	40238	40402	42100
Intra EC Exports	0	0	0	0	0	0
Other Exports	13	13	2	3	4	2
TOTAL Exports	13	13	2	3	4	2
Sow Slaughter	450	450	400	350	300	300
OTHER SLAUGHTER	21350	21350	19700	20600	20300	22000
Total Slaughter	21800	21800	20100	20950	20600	22300
Loss	1726	1726	1886	1885	1798	1798
Ending Inventories	16988	16988	17000	17400	18000	18000
TOTAL DISTRIBUTION	40527	40527	38988	40238	40402	42100
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Import Trade Matrix, Live Hogs

Import Trade Matrix					
Country	Poland		Units:	Head	
Commodity	Animal Numbers, Swine		Partial Begin	Jan	
			Partial End	Sep	
Imports for:	2000	2001	2002	2000	2001
	Full	Full	Full	Partial	Partial
U.S.		55			55
Others					
France	1288	220	100	110	220
Denmark	644	0	0	21	0
Hungary	524	0	0	0	0
The Netherlands	273	0	0	382	0
Graet Britain	26	0	0	0	0
Gujana	26	0	0	0	0
Sweden	25	0	0	0	0
Canada	0	80	0	0	80
Total for Others	2806	300	100	513	300
Others not Listed	0	45	50	26	0
Grand Total	2806	400	150	539	355

Export Trade Matrix, Live Hogs

Export Trade Matrix					
Country	Poland		Units:	Head	
Commodity	Animal Numbers, Swine		Partial Begin	Jan	
			Partial End	Sep	
Exports for:	2000	2001	2002	2000	2001
	Full	Full	Full	Partial	Partial
U.S.					
Others					
Russia	5278	1000	500	122	829
Lithuania	2488	0	0	925	0
Romania	1816	0	0	1243	0
Byelorussia	1405	50	0	11	39
Latvia	982	0	0	982	0
Ukraine	502	450	200	308	312
Croatia	0	900	1000	0	640
Bosnia&Herzeg	110	400	500	110	270
Hungary	85	0	0	56	0
Thailand	0	150	0	0	114
Total for Others	12666	2950	2200	3757	2204

Others not Listed	20	50	50	20	0
Grand Total	12686	3000	2250	3777	2204

Prices Table, Live Hogs

Prices Table			
Country	Poland		
Commodity	Animal Numbers, Swine		
Prices in	zlotys	per uom	kilogram of live weight
Year	2000	2001	% Change
Jan	3.22	4.04	25.47%
Feb	3.08	4	29.87%
Mar	3.23	4.34	34.37%
Apr	3.39	4.51	33.04%
May	3.54	4.2	18.64%
Jun	3.6	4.29	19.17%
Jul	4.19	4.43	5.73%
Aug	4.28	4.63	8.18%
Sep	4.32	4.73	9.49%
Oct	4.24	4.74	11.79%
Nov	3.84	4.56	18.75%

Dec	4.05		
Exchange Rate	4.05	Local currency/US \$	

Meat, Swine

PSD Table						
Country	Poland					
Commodity	Meat, Swine				(1000 MT CWE)(1000 HEAD)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2001		01/2002
Slaughter (Reference)	21800	21800	20100	20950	20600	22300
Beginning Stocks	60	73	31	36	27	30
Production	1635	1620	1530	1550	1575	1630
Intra EC Imports	0	0	0	0	0	0
Other Imports	48	40	33	20	45	17
TOTAL Imports	48	40	33	20	45	17
TOTAL SUPPLY	1743	1733	1594	1606	1647	1677
Intra EC Exports	0	0	0	0	0	0
Other Exports	164	147	110	100	130	120
TOTAL Exports	164	147	110	100	130	120

Human Dom. Consumption	1512	1550	1428	1476	1457	1525
Other Use, Losses	36		29		30	
TOTAL Dom. Consumption	1548	1550	1457	1476	1487	1525
Ending Stocks	31	36	27	30	30	32
TOTAL DISTRIBUTION	1743	1733	1594	1606	1647	1677
Calendar Yr. Imp. from U.S.	0	0	1	0	2	0
Calendar Yr. Exp. to U.S.	7	7	8	7	8	8

Import Trade Matrix, Meat, Swine

Import Trade Matrix					
Country	Poland		Units:	Tons	
Commodity	Meat, Swine		Partial Begin	Jan	
			Partial End	Sep	
Imports for:	2000	2001	2002	2000	2001
	Full	Full	Full	Partial	Partial
U.S.	4	600	400	4	436
Others					
Denmark	21180	10000	8000	17563	5166
Hungary	3857	1000	1000	3271	766
Belgium	2852	0	0	1943	0
Canada	2065	4000	3000	1776	2906
France	2016	200	150	1516	172
Great Britain	1773	0	0	1772	0

Ireland	871	300	200		228
Germany	659	600	500	659	470
The Netherlands	323	0	0	241	0
Norway	302	0	0	302	0
Total for Others	35898	16100	12850	29043	9708
Others not Listed	1087	2000	2000	1345	641
Grand Total	36989	18700	15250	30392	10785

Export Trade Matrix, Meat, Swine

Export Trade Matrix					
Country	Poland		Units:	tons	
Commodity	Meat, Swine		Partial Begin	Jan	
			Partial End	Sep	
Exports for:	2000	2001	2002	2000	2001
	Full	Full	Full	Partial	Partial
U.S.	7081	7000	7500	5240	5098
Others					
Russia	82393	50000	60000	57100	35297
Ukraine	6400	2500	5000	5464	2000
Byelorussia	5095	4000	5000	3469	3035
Latvia	4576	2000	4000	3824	1671

Moldovia	3618	3200	3500	2582	2407
Estonia	2798	2500	3000	21730	1743
Romania	1568	4000	5000	1393	2859
Lithuania	1194	1800	2000	732	1373
Great Britain	1035	1600	2000	946	1178
Azerbaijan	957	1000	1500	719	703
Total for Others	109634	72600	91000	97959	52266
Others not Listed	4698	5400	5000	3330	4577
Grand Total	121413	85000	103500	106529	61941

Prices Table, Pork

Prices Table			
Country	Poland		
Commodity	Meat, Swine		
Prices in	zlotys	per uom	kilogram of pork chops
			boneless
Year	2000	2001	% Change
Jan	12.67	14.35	13.26%
Feb	12.55	14.18	12.99%
Mar	12.47	14.2	13.87%
Apr	12.54	14.67	16.99%

May	12.87	14.71	14.30%
Jun	13.07	14.57	11.48%
Jul	13.71	14.67	7.00%
Aug	14.27	14.7	3.01%
Sep	14.4	14.83	2.99%
Oct	14.56	14.72	1.10%
Nov	14.37		
Dec	14.28		
Exchange Rate	4.05	Local currency/US \$	

Tariff Rate Table

Tariff Number	Product Description	Applied Tariff/1	Basic Tariff/1
102.10 0	Breeding Cattle	0	5.0
0201	Fresh or Frozen Beef	45	19 + maximum 3.03 EUR/kg

0210	Beef Products	35	22 + maximum 3.12 EUR/kg
0206.10	Beef Offal	20	12.8 + maximum 3.04 ECU/kg
0504.00.00.9	Beef Tripe	15	19
0203	Pork: fresh, chilled and frozen	30/2	76 + maximum 0.9 EUR/kg
1602.41 1602.42 1602.49	Pork products	40	102 + maximum 3.04 EUR/kg

1/ Applied tariff: used for MFN and WTO members if lower than conventional (basic) tariff;

Basic or conventional tariff: maximum bound tariff.

2/ Within the Quota

Average Meat Consumption (kilograms per capita)

	Pork	Beef	Poultry
1998	37.6	8.1	13.1
1999	39.6	7.8	13.9
2000	38.7	7.0	14.5
2001	37.5	5.5	16.0
2002	38.6	5.5	16.5